

Event Name

Event Type

Event Status

Total Cost
\$28,370.00

Feb 1, 2023 - Feb 28, 2024

Is Virtual?

Event Address

Location Name

Reset Filters

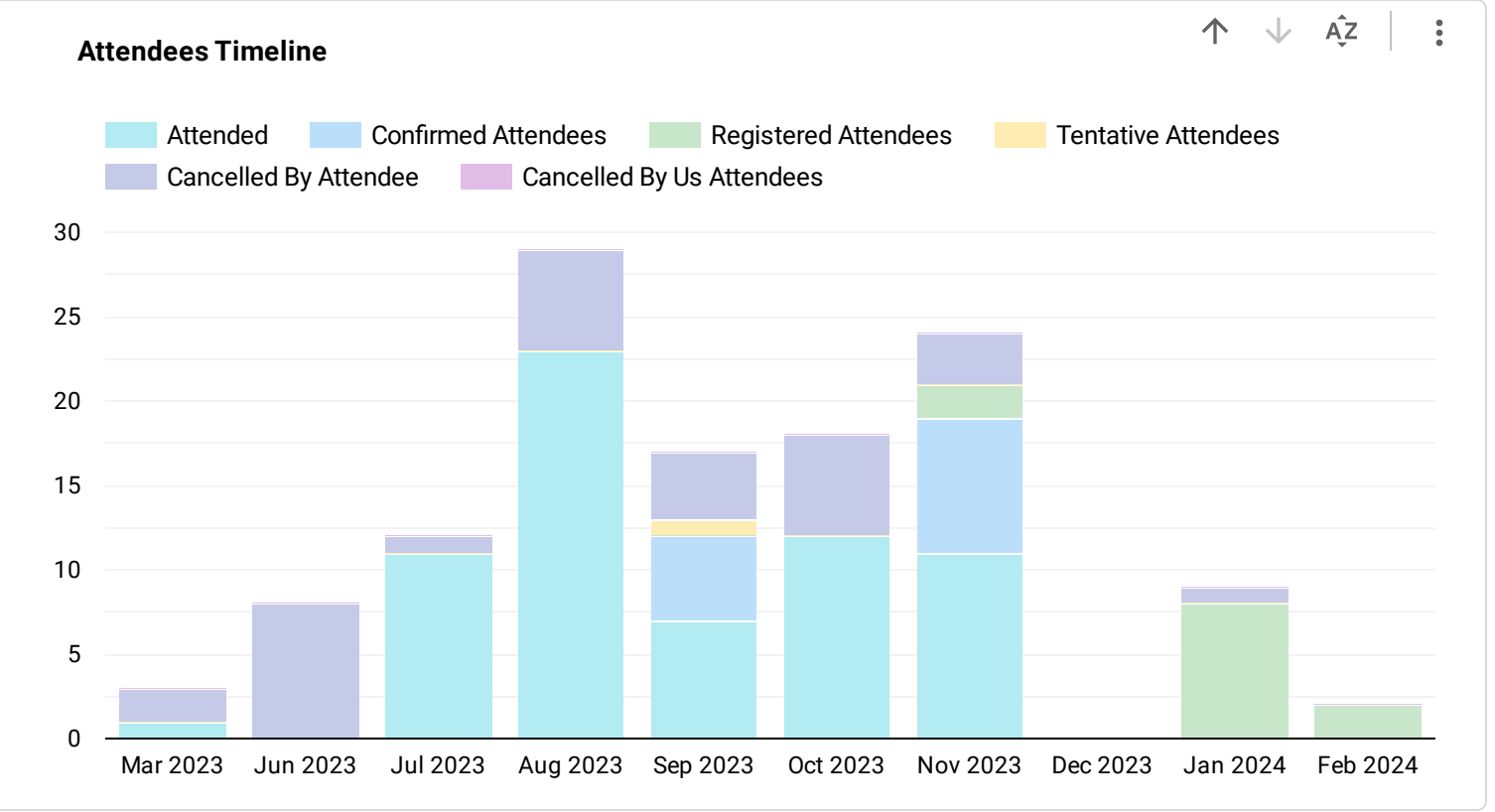
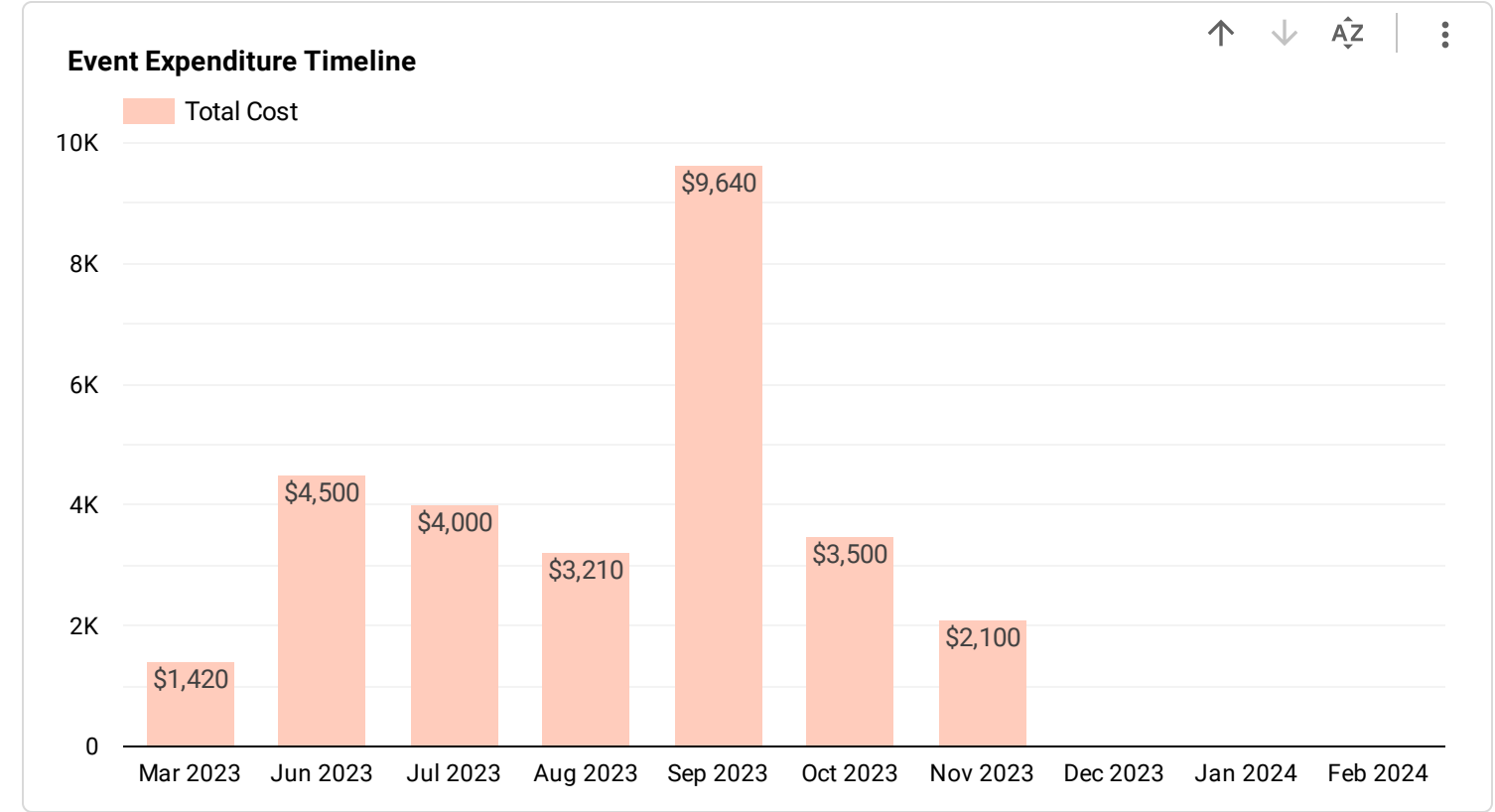
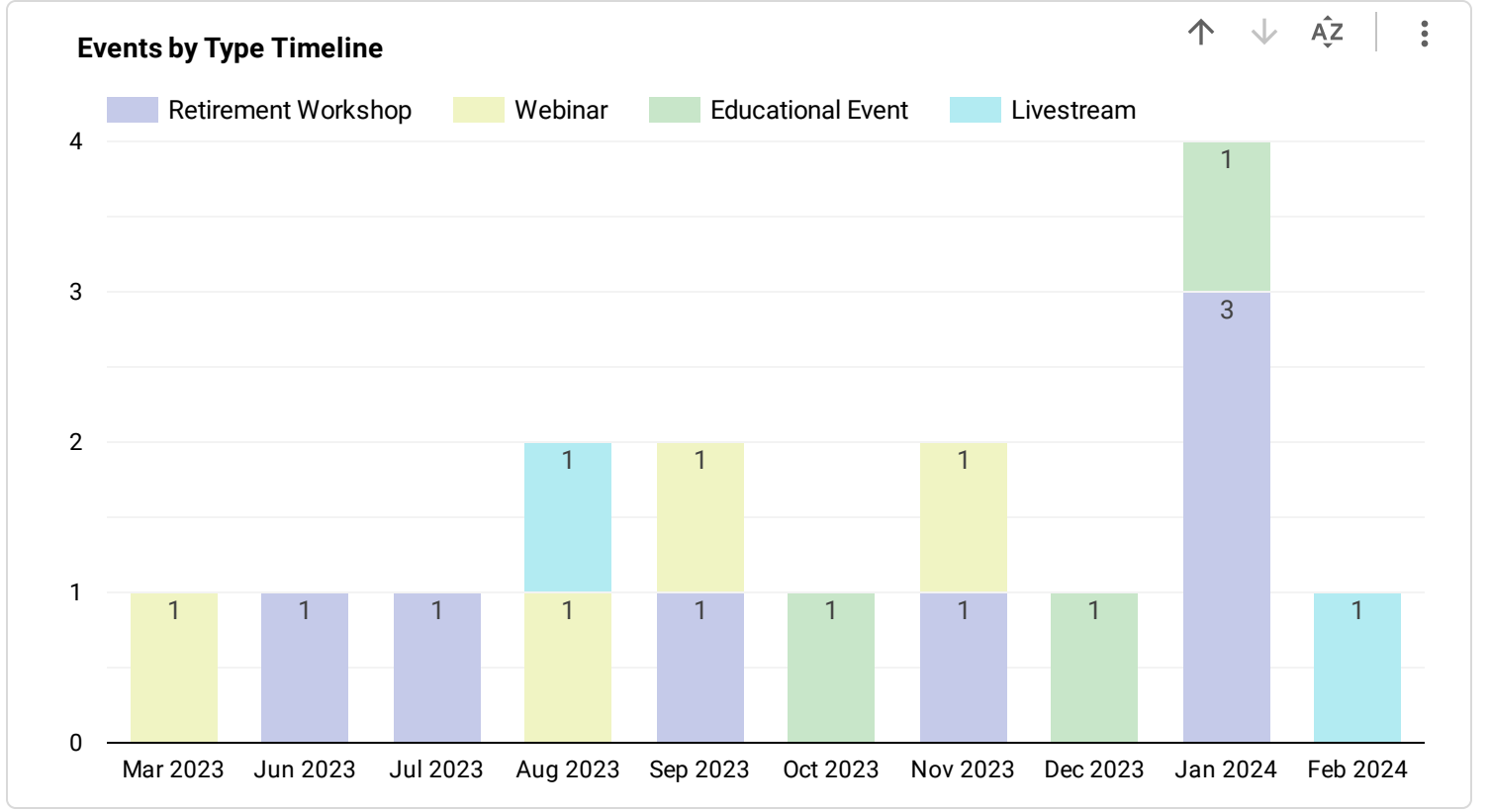
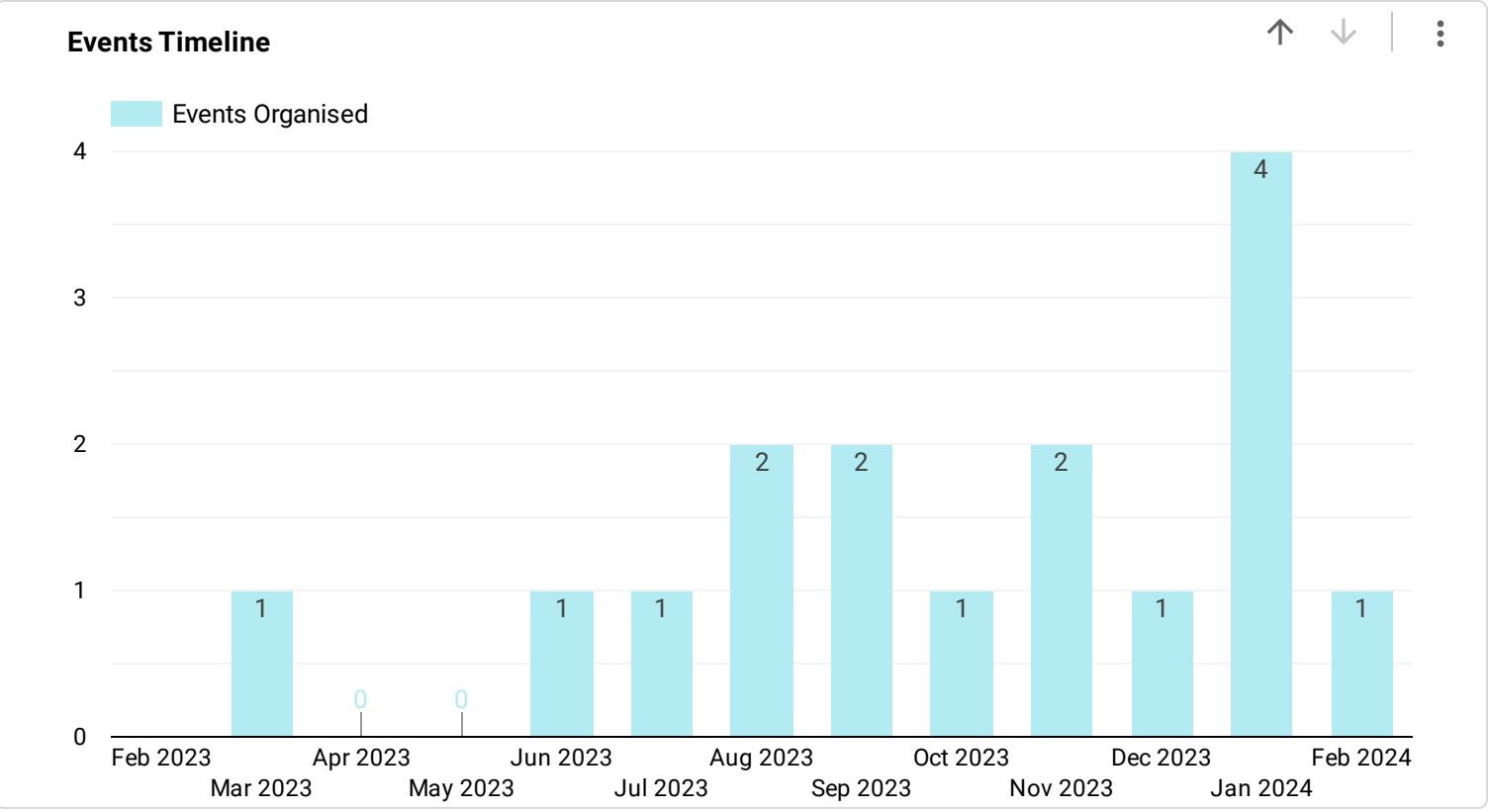
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Events
16

Total Registered
297

Attended
65

No Show
65



List of Events

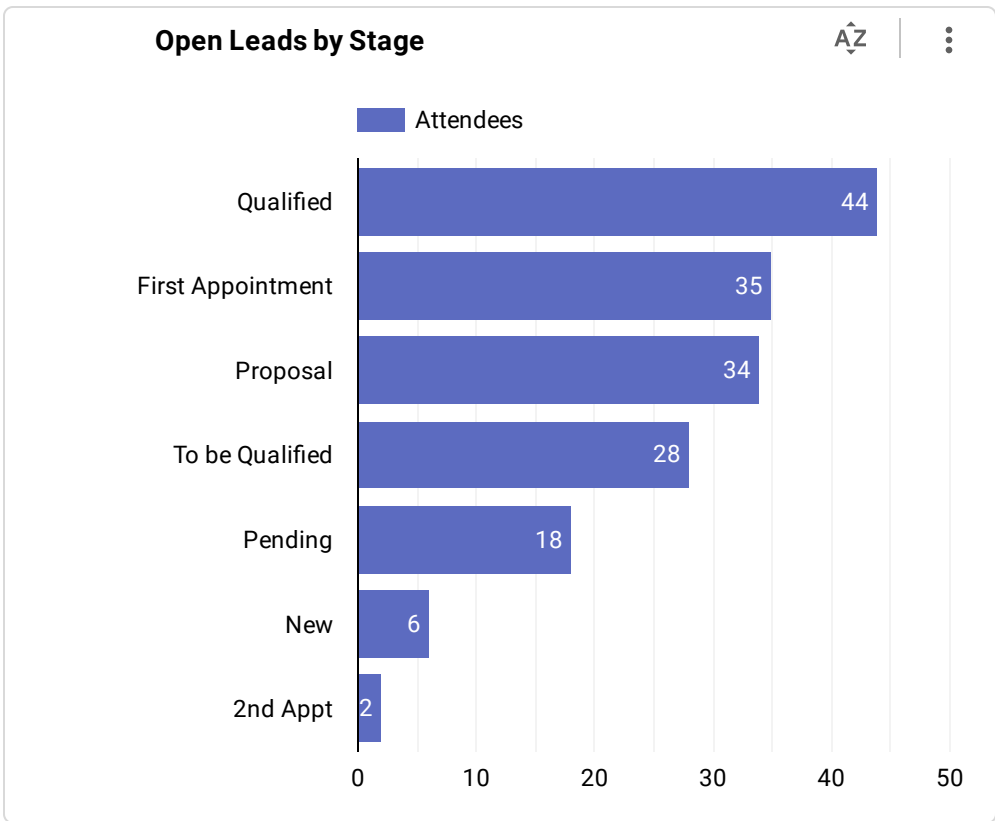
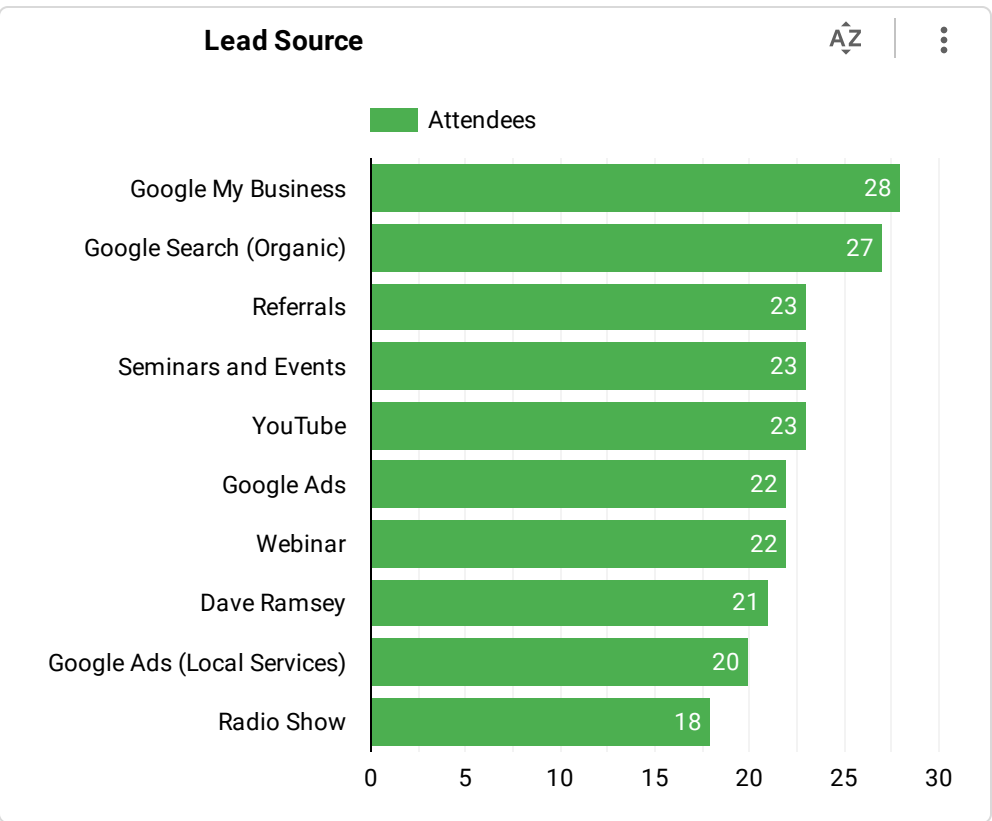
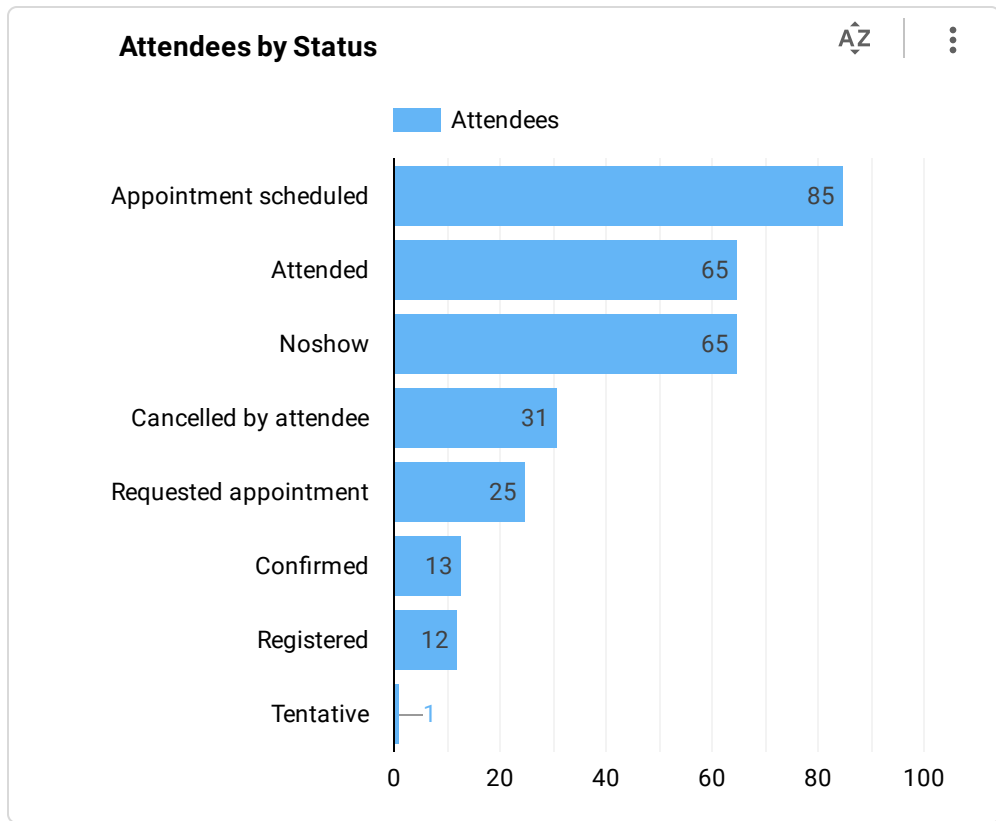
Linkable Event ID	Event Name	Event Type	Event Status	Start Date	Is Virtual?	Total Cost	Total Registered	Attended	Requested Appointment	No Show	Organizers
1. 63	Estate Planning f...	Livestream	SCHEDULED	Feb 8, 2024	true		2	0	0	0	0
2. 68	Young Profession...	Educational Event	SCHEDULED	Jan 30, 2024	false		4	0	0	0	0
3. 83	Retirement Seminar	Retirement Work...	SCHEDULED	Jan 17, 2024	false		0	0	0	0	0
4. 84	Workshop 2/1/24	Retirement Work...	SCHEDULED	Jan 17, 2024	false		1	0	0	0	0
5. 62	Retirement Planni...	Retirement Work...	SCHEDULED	Jan 15, 2024	false		5	0	0	0	0
6. 61	Investing Basics ...	Educational Event	DRAFT	Dec 10, 2023	false		0	0	0	0	0
7. 5	Nov. Retirement ...	Retirement Work...	SCHEDULED	Nov 23, 2023	true		13	0	0	0	0
8. 60	Wealth Managem...	Webinar	COMPLETED	Nov 1, 2023	true	\$2,100	30	11	3	10	0
9. 70	Fundamentals of ...	Educational Event	COMPLETED	Oct 15, 2023	false	\$3,500	43	12	3	13	0
1... 71	Insurance Produc...	Webinar	COMPLETED	Sep 20, 2023	true	\$640	33	7	4	7	0
1... 4	Sept Retirement ...	Retirement Work...	COMPLETED	Sep 12, 2023	false	\$9,000	5	0	0	0	1
1... 72	Investing in Unce...	Livestream	COMPLETED	Aug 30, 2023	true	\$2,000	51	13	3	10	0
1... 69	Mastering Financi...	Webinar	COMPLETED	Aug 12, 2023	true	\$1,210	39	10	4	10	0
1... 73	Retirement Soluti...	Retirement Work...	COMPLETED	Jul 18, 2023	false	\$4,000	32	11	4	11	0
1... 74	Tax Efficiency for ...	Retirement Work...	COMPLETED	Jun 22, 2023	false	\$4,500	25	0	1	2	0
1... 64	Navigating Marke...	Webinar	COMPLETED	Mar 20, 2023	true	\$1,420	14	1	3	2	0
Grand total						\$28,370	297	65	25	65	1

Event Name Event Type Event Status Event Registration Status Feb 1, 2023 - Feb 28, 2024

Client Status Lead Stage Lead Source Office Location

[Reset Filters](#) [Download \(PDF\)](#)

Total Registered **297**
 Attended **65**
 No Show **65**



Open Leads Stages Per Event and Stage

Event Name	To be Qualified	Qualified	Proposal	Pending	New	First Appointment	Grand total
Investing in Uncertain Times	4	6	8	3		3	24
Retirement Solutions Roundtable	5	6	2	2		5	20
Fundamentals of Financial Planning	3	9	3	1		2	19
Mastering Financial Portfolios	4	6	4	1		4	19
Insurance Products Explained	2	5	3	4		5	19
Wealth Management Today	5	5	3	1		5	19
Nov. Retirement Workshop	1	4	2	1	2	3	13
Tax Efficiency for High Net Worth Individuals			4	5		1	10
Navigating Market Volatility	1		3			3	7
Sept Retirement Workshop			1			3	5
Retirement Planning: Secure Your Future	2	3					5
Grand total	28	44	34	18	7	35	168

List of Attendees

Linkable Lead ID	Name	Email	Phone	Office Location	Attendee Registration Date	Lead Source	Lead Stage	Client Status
1. 177856	James Bond	007@mi6.com	+12819087111		Jan 28, 2024			
2. 177563	Mustapha Ramadan	mustapha+99@leadcenter.ai	+12819087111		Jan 23, 2024			
3. 176673	Mustapha Ramadan	mustapha+10@leadcenter.ai	+12819087706		Jan 18, 2024			
4. 83549	Lanae Duchant	pengelbrecht5@cloudflare.com	+1 (619) 291-4549		Nov 21, 2023	Generated Offline	Proposal	
5. 83552	Itch Alldred	ckleeborn8@newyorker.com	+1 (314) 397-2917		Nov 21, 2023	Generated Offline	To be Qualified	
6. 83568	William D Nelligan	charryf@vistaprint.com	+19048391939		Nov 21, 2023	Generated Offline		
7. 172028	Tom brady	tombrady@gmail.com			Jan 17, 2024		First Appointment	
8. 83552	Itch Alldred	ckleeborn8@newyorker.com	+1 (314) 397-2917		Nov 21, 2023	Generated Offline	To be Qualified	
9. 83544	Valaria Smorthit	aclout0@hhs.gov	+1 (504) 478-4282		Nov 21, 2023	Radio Show	Qualified	
10. 83757	Elizabeth G. Bowen	dtanser5@last.fm	+12125140539		Nov 21, 2023	Google My Business	To be Qualified	
11. 83755	Pamela J. Murphy	mregelous8@parallels.com	+15803664549		Nov 21, 2023	Referrals	Qualified	
12. 83559	Burnard Cowdry	tginif@twitpic.com	+14157764943		Nov 21, 2023	Google My Business	Qualified	
13. 83407	Elfreda Bartozzi	blangton11@dot.gov	+1 (410) 767-2606		Nov 20, 2023	Seminars and Events	Qualified	
14. 83471	Jule Petrov	oeadmeadv@icio.us	+1 (603) 642-6636		Nov 20, 2023	Seminars and Events	Proposal	
15. 83569	Kay Crowley	vijide9524@ikanid.com	(615) 559-8014		Nov 20, 2023	Seminars and Events	First Appointment	
16. 82987	Alex Halani	alex.halani@starc.com	+12813777024		Nov 13, 2023	Google Search (Organic)	Proposal	Not a Client

Event Name ▾

Event Type ▾

Event Status ▾

Feb 1, 2023 - Feb 28, 2024 ▾

Is Virtual? ▾

Event Address ▾

Location Name ▾

Reset Filters

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Events
16
- from previous 393 days

Spend Amount
\$28,370.00
- from previous 393 days

List of Expenditures										⋮
	Event Name ▾	Event Date	Event Type	Event Status	Is Vritual?	Location Name	Event Address	Spend Date	Spend Name	Spend
1.	Young Professionals Financial ...	Jan 30, 2024	Educational Event	SCHEDULED	false	Uptown Convention Hall	654 New Age St, Youth City, YC 10101			
2.	Workshop 2/1/24	Jan 17, 2024	Retirement Workshop	SCHEDULED	false					
3.	Wealth Management Today	Nov 1, 2023	Webinar	COMPLETED	true			Nov 1, 2023	Webinar Platform Fees	
4.	Wealth Management Today	Nov 1, 2023	Webinar	COMPLETED	true			Nov 1, 2023	Guest Speaker Honorariums	
5.	Wealth Management Today	Nov 1, 2023	Webinar	COMPLETED	true			Nov 1, 2023	Marketing and Promotion	
6.	Tax Efficiency for High Net Wort...	Jun 22, 2023	Retirement Workshop	COMPLETED	false	Elmwood Conference ...	234 Wealthy Ave, Affluent City, AC 11223	Jun 22, 2023	Catering	
7.	Tax Efficiency for High Net Wort...	Jun 22, 2023	Retirement Workshop	COMPLETED	false	Elmwood Conference ...	234 Wealthy Ave, Affluent City, AC 11223	Jun 22, 2023	Training Materials	
8.	Tax Efficiency for High Net Wort...	Jun 22, 2023	Retirement Workshop	COMPLETED	false	Elmwood Conference ...	234 Wealthy Ave, Affluent City, AC 11223	Jun 22, 2023	Expert Speaker Fees	
9.	Tax Efficiency for High Net Wort...	Jun 22, 2023	Retirement Workshop	COMPLETED	false	Elmwood Conference ...	234 Wealthy Ave, Affluent City, AC 11223	Jun 22, 2023	Venue Rental	
10.	Sept Retirement Workshop	Sep 12, 2023	Retirement Workshop	COMPLETED	false	Ruth Steak House	3431 Main Street, Houston Texas 77494	Sep 13, 2023	Restuarant	
11.	Sept Retirement Workshop	Sep 12, 2023	Retirement Workshop	COMPLETED	false	Ruth Steak House	3431 Main Street, Houston Texas 77494	Sep 12, 2023	Mailer	
12.	Retirement Solutions Roundtable	Jul 18, 2023	Retirement Workshop	COMPLETED	false	Harbor View Hotel	890 Retirement Rd, Sunset Town, ST 3...	Jul 18, 2023	Venue Hire	
13.	Retirement Solutions Roundtable	Jul 18, 2023	Retirement Workshop	COMPLETED	false	Harbor View Hotel	890 Retirement Rd, Sunset Town, ST 3...	Jul 18, 2023	Networking Refreshments	
14.	Retirement Solutions Roundtable	Jul 18, 2023	Retirement Workshop	COMPLETED	false	Harbor View Hotel	890 Retirement Rd, Sunset Town, ST 3...	Jul 18, 2023	AV Equipment	
15.	Retirement Solutions Roundtable	Jul 18, 2023	Retirement Workshop	COMPLETED	false	Harbor View Hotel	890 Retirement Rd, Sunset Town, ST 3...	Jul 18, 2023	Roundtable Setup	
16.	Retirement Seminar	Jan 17, 2024	Retirement Workshop	SCHEDULED	false	Capital Grill	Houston, texas			
17.	Retirement Planning: Secure Y...	Jan 15, 2024	Retirement Workshop	SCHEDULED	false	Greenwich Seminar R...	789 Pension Rd, Saverville, SV 23456			
18.	Nov. Retirement Workshop	Nov 23, 2023	Retirement Workshop	SCHEDULED	true	Capital Steak House	3134 Main Street Houston, Texas 77543			
19.	Navigating Market Volatility	Mar 20, 2023	Webinar	COMPLETED	true			Mar 20, 2023	Guest Speaker Honorariums	
20.	Navigating Market Volatility	Mar 20, 2023	Webinar	COMPLETED	true			Mar 20, 2023	Webinar Platform Fees	
21.	Navigating Market Volatility	Mar 20, 2023	Webinar	COMPLETED	true			Mar 20, 2023	Marketing and Promotion	
22.	Mastering Financial Portfolios	Aug 12, 2023	Webinar	COMPLETED	true			Aug 12, 2023	Webinar Platform Fees	
23.	Mastering Financial Portfolios	Aug 12, 2023	Webinar	COMPLETED	true			Aug 12, 2023	Marketing and Promotion	
24.	Mastering Financial Portfolios	Aug 12, 2023	Webinar	COMPLETED	true			Aug 12, 2023	Expert Speaker Fees	
Grand Total										